

# **Pulse Oximeter Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028**

## **Segmented By Product Type (Fingertip, Handheld and Others), By Sensor Type (Reusable v/s Disposable), By Patient Type (Adult, Pediatric, Neonatal), By End User (Hospitals & Clinics, Homecare, Others), By Region and Competition**

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### **Abstracts**

In 2022, the Global Pulse Oximeter Market achieved a valuation of USD 3452.23 Million, and it is poised for significant growth in the forecast period, maintaining an impressive Compound Annual Growth Rate (CAGR) of 5.24% through 2028. A pulse oximeter represents a discreet and non-invasive electronic device designed to monitor changes in the blood's oxygen saturation level. These devices come in various styles, including fingertip, wrist-worn, tabletop/besides, portable, and pediatric models. In medical settings such as hospitals and healthcare facilities, portable oximeters are prevalent due to their advanced features. Unlike traditional analog models, these devices feature a clip connected to the screen via a cable, rather than being directly attached to the oxygen monitor or screen itself. The screen not only displays blood oxygen saturation levels but also provides additional diagnostic information. This instrument employs infrared light to measure readings accurately.

The landscape of pulse oximeter technology has been significantly shaped by technological advancements, introducing a plethora of potential options to the industry. These advancements have enhanced the accuracy and reliability of measuring hemoglobin levels, oxygen saturation, and pulse rate (PR). Additionally, they have made it possible to conduct morphological investigations of the waveform using pulse oximeter technology. The market has witnessed the introduction of digital pulse

oximeters, which are expected to drive substantial sales. Furthermore, smartphone applications are now available to operate these digital pulse oximeters, adding to their convenience and accessibility.

## Key Market Drivers

### Increasing Prevalence of Respiratory Diseases

The wide range of applications for pulse oximeters includes various indications such as endotracheal intubation, cardiac arrest, procedural sedation, asthma/chronic obstructive pulmonary disease (COPD), respiratory complaints, acute respiratory distress syndrome (ARDS), sleep disorders/sleep apnea, and shunts in cyanotic heart disease.

One of the key drivers for the increasing demand of pulse oximeters, both in developed and developing countries, is the prevalence of chronic respiratory disorders such as COPD, asthma, and obstructive sleep apnea (OSA). The growth of asthma in low and middle-income countries, particularly in Asia, is notable. For example, it is estimated that around 34 million people in India had asthma in 2022, accounting for 13.09% of the global burden. COPD is the third-leading cause of death worldwide and resulted in over 3.2 million deaths globally in 2022. These factors are anticipated to fuel the growth of the pulse oximetry market during the forecast period.

The increasing prevalence of chronic respiratory diseases such as COPD, asthma, sleep apnea, cystic fibrosis, and other respiratory infections is expected to drive the market to a certain extent. Oxygen saturation is a vital parameter in the management of COPD and asthma, and pulse oximeters accurately measure blood oxygen levels in patients with these conditions. According to the American Lung Association, COPD is the leading cause of death in the U.S., with over 12.5 million diagnosed cases and several undiagnosed cases.

Several factors contribute to the growth of the Pulse Oximeter market, including the rising prevalence of respiratory diseases like COPD, asthma, and pneumonia worldwide. Individuals are increasingly recognizing the importance of monitoring oxygen saturation levels for maintaining good health. Furthermore, technological advancements such as wireless connectivity and mobile applications are enhancing the user-friendliness and accessibility of pulse oximeter devices.

### Technological Advancements and Easy Accessibility

Technological advancements have revolutionized the market for pulse oximeters, making these devices more accessible and user-friendly. Furthermore, the miniaturization of sensors has led to the introduction of compact and portable pulse oximeters that can be used at home or on the go. These advancements have resulted in improved accuracy and reliability, providing users with precise readings and dependable results. The integration of wireless connectivity and smartphone applications has further enhanced the functionality and convenience of pulse oximeters, enabling data tracking, analysis, and sharing with healthcare professionals, if necessary. The increased accessibility, affordability, and user-friendly nature of pulse oximeters have expanded their availability to a wider consumer base, driving market growth and adoption of these devices.

Emerging technologies, such as the application of artificial intelligence (AI) algorithms to combine pulse oximetry data for improved patient outcomes and remote patient monitoring, have the potential to positively impact the industry. Technological advancements in terms of accuracy, safety, and automation are expected to drive market growth throughout the forecast period. Manufacturers are focusing on developing automated, wireless, and remote oximeters for self-monitoring, thereby reducing hospitalization and physician visits. For example, in December 2021, Teli Health announced the launch of its first U.S. FDA-approved 4G connected oximeter. This newly introduced oximeter is suitable for remote patient monitoring.

### Increasing Portable and Handheld Pulse Oximeters in the Home Healthcare

The demand for portable and transportable pulse oximeters for home healthcare is witnessing significant growth. Pulse oximeters are increasingly being utilized in the fields of sports medicine and aviation. The expanding geriatric population worldwide, along with their susceptibility to respiratory disorders, also contributes to the market's growth. Moreover, there is a rising demand for pulse oximeters in hospitals and clinics, particularly for critical care patients. Additionally, the market is being driven by the growing use of pulse oximeters in remote patient monitoring systems.

Furthermore, the increasing focus on fitness and wellness among the masses has spurred the demand for pulse oximeters. Athletes, fitness enthusiasts, and individuals involved in physical activities are increasingly relying on pulse oximeters to monitor their oxygen levels during workouts. By monitoring their oxygen saturation in real-time, they can optimize their performance, prevent overexertion, and ensure their safety during exercise. Pulse oximeters offer immediate feedback, empowering individuals to make informed decisions about their training intensity and make necessary adjustments. This

growing emphasis on maintaining peak fitness levels and prioritizing overall well-being has resulted in a surge in the adoption of pulse oximeters as essential tools in the fitness and wellness industry, thereby fueling market growth.

### Increasing Aging Population and Hospital Adoption of Oximeter

The demand for pulse oximeters is not only rising in developed economies but also in developing economies. As these economies prioritize preventative healthcare and wellness programs, the market for pulse oximeters is experiencing significant growth. This can be attributed to the increasing awareness among individuals about the importance of monitoring oxygen levels and overall health.

Furthermore, the advancements in technology have made pulse oximeters more accessible and user-friendly, allowing individuals to easily track their vital signs at home. This convenience has further contributed to the growing demand for pulse oximeters, as people seek to take control of their health and well-being.

Moreover, the ongoing COVID-19 pandemic has highlighted the importance of monitoring oxygen saturation levels, as low oxygen levels can be an early indicator of respiratory distress. This has led to a surge in demand for pulse oximeters, not only for personal use but also in healthcare settings. With the global focus on healthcare and well-being, the demand for pulse oximeters is expected to continue its upward trajectory. As individuals become more proactive in managing their health, pulse oximeters play a crucial role in providing them with real-time information about their oxygen levels, empowering them to make informed decisions about their well-being.

### Key Market Challenges

#### High Price for Innovative Pulse Oximeter Devices

Advanced pulse oximeter devices are relatively expensive, which can discourage healthcare providers from acquiring them. These devices come with a higher price tag due to their advanced features, such as continuous monitoring and customizable alarms. Chronically ill patients may need to use these devices at home, leading to additional financial burdens for both patients and caregivers. The high cost of sophisticated pulse oximeter devices has implications for the accessibility of pulse oximetry in low-income and underserved communities. The lack of affordable devices in these communities may contribute to more severe health outcomes.

## Low-Cost Pulse Oximeter Models Have Limited Accuracy and Reliability

Low-cost pulse oximeter models can be prone to inaccuracy and unreliability. While these devices are more affordable and accessible, their limited precision and dependability can compromise patient safety and care. In certain cases, inaccurate readings may lead to misdiagnosis or treatment delays. This challenge is particularly prevalent in developing nations where access to sophisticated pulse oximeters is limited. Consequently, healthcare providers in these regions face difficulties in accurately measuring patient oxygen saturation levels, which can result in suboptimal patient care.

## Key Market Trends

### Increasing Online Marketing Strategies by Market Vendors

A significant factor influencing the growth of the global pulse oximetry market is the implementation of effective online marketing strategies by market vendors. The marketing tactics employed by vendors for pulse oximeters have undergone a transformation due to the growing preference for home care settings. As a result, vendors are innovating new approaches to enhance their market presence through online marketing activities, thereby increasing product sales.

Prominent vendors like Masimo are strategically leveraging their online presence by establishing official pages on popular social media platforms such as Twitter and Facebook to effectively market their pulse oximetry products. Furthermore, an increasing number of vendors are embracing online retailing, enabling them to extend their reach beyond traditional end-users such as clinics and hospitals, and cater to the needs of home-based healthcare users. These emerging trends are anticipated to drive the growth of the pulse oximetry market throughout the forecast period.

### Expansion of Medical Businesses in Developing Nations

Players in the pulse oximeter market for medical devices can anticipate significant growth opportunities from emerging economies. As the governments of China and India continue to prioritize value-based care systems and healthcare modernization, investments in the medical sector are steadily increasing. Moreover, the rise of medical equipment and generic pharmaceuticals manufacturing hubs in these emerging nations further contributes to the growth potential. With the production of medical devices already experiencing substantial growth, current trends suggest even greater

opportunities on the horizon. This promising outlook positions the pulse oximeter market to thrive in the coming years.

## Segmental Insights

### Product Type Insights

The segment of handheld pulse oximeters held the largest market share in 2022 and is projected to experience significant growth during the forecast period. This can be attributed to the high prevalence of respiratory diseases, increasing hospitalizations, and the convenience of using handheld devices in emergency situations. Furthermore, technological advancements in terms of accuracy, safety, and data transfer capabilities are driving the adoption of this segment. To stay competitive, leading market players are introducing new products with enhanced features. For instance, in September 2020, Masimo announced the U.S. FDA clearance of the Rad-G handheld pulse oximeter.

On the other hand, the fingertip pulse oximeters segment is expected to exhibit the highest growth rate throughout the forecast period. This growth is driven by the increasing demand for continuous patient monitoring at home settings, growing patient awareness, and the rising trend of preventive healthcare.

### Sensor Type Insights

In 2022, the disposable sensor segment emerged as the primary revenue driver due to its non-invasive monitoring capabilities and lightweight nature, enhancing patient satisfaction. Additionally, disposable sensors exhibit remarkable flexibility and biocompatibility with soft materials, making them ideal for long-term monitoring. Furthermore, the utilization of disposable sensor oximeters has been further accelerated by their superior ability to prevent cross-contamination and healthcare-associated infections (HAIs). Noteworthy industry leaders offering disposable sensors include Honeywell International Inc. and NIHON KOHDEN CORPORATION, among others.

Moreover, reusable probes ranked as the second-highest revenue contributor in 2022. The robust demand for reusable probes in intensive care units, their compatibility with commonly used monitoring devices, distinctive product designs, and precise measurement results are expected to drive segment growth. Furthermore, the inherent ability of reusable probes to withstand mechanical stress and facilitate ease of cleaning has significantly contributed to their widespread adoption.

## Regional Insights

North America is projected to make the largest contribution to the growth of the global market during the forecast period. Technavio's analysts have provided detailed insights into the regional trends and drivers that shape the market during this period. Factors such as the high prevalence of respiratory disorders and chronic diseases, increasing surgical procedures, the presence of skilled physicians, and advancements in healthcare infrastructure are significantly driving the growth of the pulse oximeter market in the region. Furthermore, the market in North America is propelled by the presence of renowned vendors like General Electric Co., Medtronic, Masimo, and Smiths Medical. The rising mortality rate due to respiratory disorders and cardiovascular diseases (CVDs) necessitates early diagnosis and prevention. Therefore, these factors are anticipated to drive the growth of the global pulse oximetry market throughout the forecast period.

## Key Market Players

Medtronic, Plc.

GE Healthcare

Koninklijke Philips N.V.

Masimo Corporation

Nihon Kohden Corporation

Nonin Medical, Inc.

Omron Corporation

Opto Circuits India Ltd.

Welch Allyn, Inc.

OSI Systems, Inc.

Report Scope:

In this report, the Global Pulse Oximeter Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Pulse Oximeter Market, By Product Type:

Fingertip

Handheld

Others

Pulse Oximeter Market, By Sensor Type:

Reusable

Disposable

Pulse Oximeter Market, By Patient Type:

Adult

Paediatric

Neonatal

Pulse Oximeter Market, By End User:

Hospitals & Clinics

Homecare

Others

Pulse Oximeter Market, By Region:

North America

United States



Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Pulse Oximeter Market.

### Available Customizations:

Global Pulse Oximeter market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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